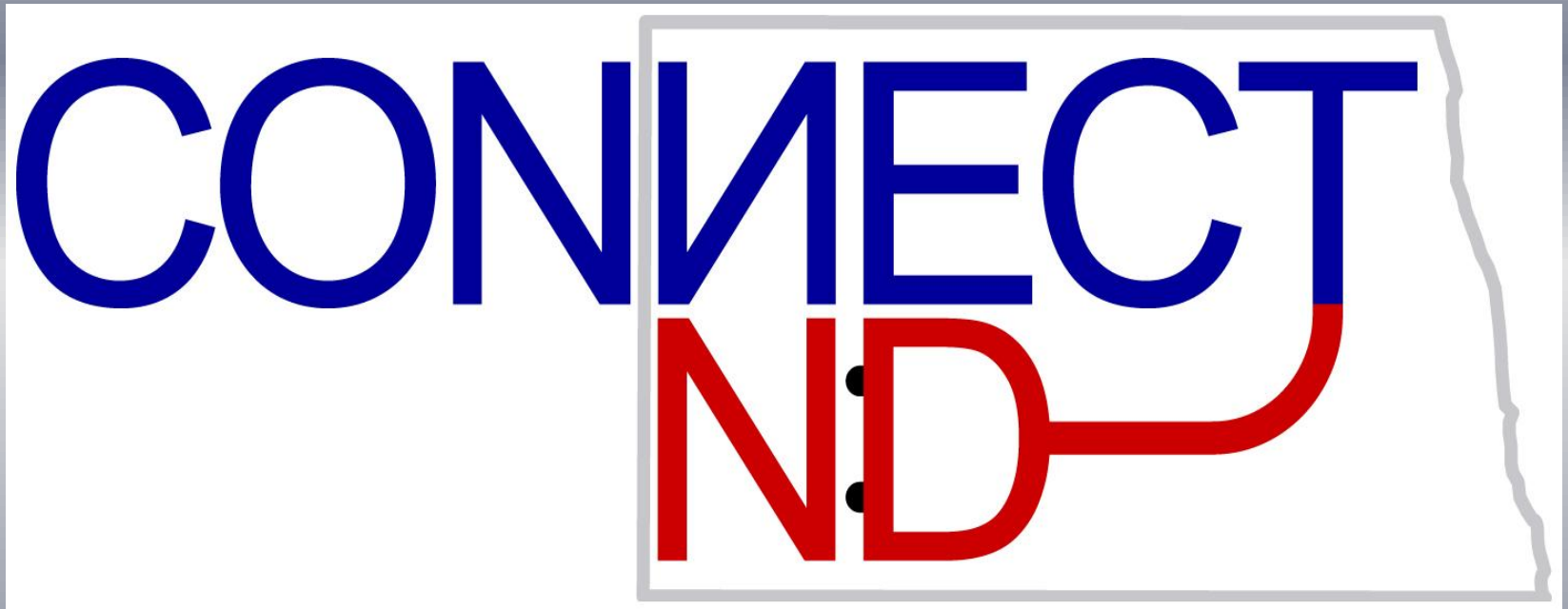


PROJECTS



9.0 Upgrade

Project Costing

To create a new project:

Navigation: Project Costing>Project Definitions>General Information

The screenshot shows a web application interface for 'General Information'. At the top, there are two buttons: 'Find an Existing Value' and 'Add a New Value'. Below these, there are three input fields: 'Business Unit' with the value '11000' and a search icon, 'Project' with the value 'NEXT', and 'Create' with a dropdown menu. The dropdown menu is open, showing five options: 'Blank Project' (highlighted), 'Blank Project', 'Project Template', 'Project from Copy', and 'Project from Microsoft Project'. Below the dropdown, there is a yellow 'Add' button and a link 'Find an Existing Value'.

Drop down box options.

Blank Project: This is the default for create a new project.

Project Template: Create a template to use to set up future projects.

Project from Copy: Create a new project by copying an existing project.

Project from Template: Create a new project from a template you have set up.

Create a project using **Blank Project**: Give your Project a name or number and click on the ADD button. Note: If you forget to change the default of NEXT in the Project box, you will see NEXT in the Project name below. Don't save the screen below and go back to the General Information screen and give your project a name or number and add again.

General Information

Project Costing Definition

Manager

Location

Phases

Approval

Justification

User Fields

Project: TRAINING

Add to My Projects

*Description: For training purposes

☐ Program

Processing Status: Active

*Integration: 11000

OMB Integration

Project Status: A

Approved

Project Type:

Percent Complete: 0.00

Project Health:

As Of:

As Of:

Project Schedule

*Start Date: 03/13/2008

*End Date: 06/30/2008

Additional Dates

Description

Find | View All

First

1 of 1

Last

Date/Time Stamp: 03/11/08 2:27:26PM

User ID: EHOLWEGNER@ND.GOV

Description:

Long Description:

Save as Template

Copy Project

Note the Processing Status and Project Status information. Processing status of Active allows the project to be used with transactions. The Project Status is tied to the processing status and has a drop down box for you to select different options. However, when creating a new project, the processing status comes up Active and you have to select a Project Status that is tied to a Processing Status of Active. Those options are approved and open.

Look Up Project Status

SetID:
Project Status:

[Basic Lookup](#)

Search Results

View All	First	1-9 of 9	Last
Project Status	Status Description		
A	Approved		
B	Budgeted		
C	Closed		
F	Forecasted		
H	Hold		
I	In Service		
O	Open		
P	Proposed		
Z	Frozen		

If you don't want the project to be used immediately, you can change the Project Status, which will change the Processing Status, after you have saved the project as approved. After you have saved, the Project Status of Approved is a hyperlink that you can click on. You would then add an additional Status, or more than one additional Status as shown below.

1. The Original Status the day project was created. Cannot change the effective date:

Status

Project: Description:

Project Status

Find | View All

First

3 of 3

Last

Effective Date:	<input type="text" value="03/11/2008"/>	Sequence:	<input type="text" value="0"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
*Status:	<input type="text" value="A"/>	Approved			
Priority:	<input type="text" value="0"/>				
Interest Calculation Factor:	<input type="text" value="0.0"/>				
Comments:	<input type="text"/>				

[Return to General Information](#)

2. Same day project was created, used the + button and changed status to frozen with an effective date the same day the project was created. That changed the Processing Status to Inactive.

Status

Project: EXAMPLECOPY Description:

Project Status

Find | View All First 2 of 3 Last

Effective Date: 03/11/2008 Sequence: 1

*Status: Z Frozen

Priority: 0

Interest Calculation Factor: 0.0

Comments:

+

-

[Return to General Information](#)

Save

Return to Search

Previous in List

Next in List

Notify

Refresh

Update/Display

Include History

If you add a new status with the same effective date as the current status, you may get a warning that says effective date/sequence must be greater than the current one when you save. You can just change the sequence number to the next number if this happens.

3. On the same day Project was created and after status was changed to frozen, added a status of Approved with a future effective date. The Processing Status will change to Active on that future date and can then be used with Transactions.

Status

Project: EXAMPLECOPY Description:

Project Status Find | View All First 1 of 3 Last

Effective Date: 03/14/2008 Sequence: 2 + -

*Status: A Approved

Priority: 0

Interest Calculation Factor: 0.0

Comments:

[Return to General Information](#)

Save Return to Search Previous in List Next in List Notify Refresh Update/Display Include History

Note: See the hyperlinked [Approved](#) on Project Status below. This is what you use to change the Project Status. You can also close a project in the future by using the project status hyperlink and adding a status. Select closed status and fill in the date you want the project closed in the future. The project will be change to inactive status on that effective date.

The Project Schedule start and end dates are informational only. It's the effective date of the Project Status that effects the dates projects can be used for transactions.

On the Projects general information screen there are additional tabs but may not use any more than before. But, you no longer have to go to the second tab “Project Costing Definition” to set a project up to be copied. Just click on the Save as Template button on the bottom of the Screen.

The screenshot shows a web application interface for project management. At the top, there are several tabs: **General Information**, **Project Costing Definition**, **Manager**, **Location**, **Phases**, **Approval**, **Justification**, and **User Fields**. The **General Information** tab is active.

Project: TRAINING [Add to My Projects](#)

***Description:** For training purposes ☐ Program **Processing Status:** Active

***Integration:** 11000 OMB Integration **Project Status:** [Approved](#)

Project Type:

Percent Complete: 0.00 **As Of:**

Project Health: **As Of:**

Project Schedule

***Start Date:** 03/13/2008 ***End Date:** 06/30/2008 [Additional Dates](#)

Description Find | View All | First | 1 of 1 | Last

Date/Time Stamp: 03/11/08 2:27:26PM **User ID:** EHOLWEGNER@ND.GOV

Description:

Long Description:

[Save as Template](#) [Copy Project](#)

Go To: [My Projects](#) [Project Valuation](#) [Project Team](#) [Project Activities](#)

Save as Template

Project Business Unit: 11000

Description: Office of Management & Budget

Project: TRAINING

Description: For training purposes

Project Template

*Project Template Name:

☒ Private

☐ Public

Save

Cancel

[Return to General Information](#)

You need to give the Project Template a name and check it Private or Public. The Default is to Private. If Private, only you can use the template. If Public, anyone in your Business Unit with access to add projects can use it. Then Save. The project template will include the project and all of the activities for the project.

You would however want to go to the Project Costing Definition tab if you use Standard Activities. It is on this page, you would check if the Project is to use Standard Activities.

The screenshot shows the 'Project Costing Definition' tab of a software application. The interface includes a top navigation bar with tabs: 'General Information', 'Project Costing Definition' (selected), 'Manager', 'Location', 'Phases', and 'Approval'. Below the navigation bar, the 'Project' is set to 'TRAINING' and the 'Description' is 'For training purposes'. The main area is divided into several sections: 'System Fields' with inputs for '*FS_08 SetID:' (11000) and 'System Source:' (PPC); 'Projects Utilities' with a 'Project Tree...' link; 'Enforce Team' with radio buttons for 'Do Not Enforce' (selected), 'Project Team Only', and 'Project and Activity Team'; 'Percent Complete' with dropdowns for '*Calculation Method:' (Manual), '*Summary Method:' (None), and '*Retain History:' (Weekly); 'Project Currency' with inputs for 'Currency Code:' (USD), 'Rate Type:' (CRRNT), and 'Effective Date Default:' (Acct Date); 'Analysis Group Options' with inputs for 'Cost Budget:' (BUD), 'Revenue Budget:' (RBUD), 'Actual Cost:' (ACT), 'Actual Revenue:' (PSREV), and 'Forecast:' (EAC); and 'Options' with checkboxes for 'Standard Activities' and 'Allow Interest Calculation'. At the bottom, there are buttons for 'Save as Template' and 'Copy Project', and a 'Go To:' section with links for 'My Projects', 'Project Valuation', 'Project Team', 'Project Activities', and a 'More' dropdown menu.

General Information | **Project Costing Definition** | Manager | Location | Phases | Approval

Project: TRAINING Description: For training purposes

System Fields

*FS_08 SetID: 11000
System Source: PPC

Projects Utilities

[Project Tree...](#)

Enforce Team

☒ Do Not Enforce
☐ Project Team Only
☐ Project and Activity Team

Percent Complete

*Calculation Method: Manual
*Summary Method: None
*Retain History: Weekly

Project Currency

Currency Code: USD
Rate Type: CRRNT
Effective Date Default: Acct Date

Analysis Group Options

Cost Budget: BUD
Revenue Budget: RBUD
Actual Cost: ACT
Actual Revenue: PSREV
Forecast: EAC

Options

☐ Standard Activities
☐ Allow Interest Calculation

Save as Template Copy Project

Go To: [My Projects](#) [Project Valuation](#) [Project Team](#) [Project Activities](#) More

To add activities for the project, click on the Project Activities hyperlink at the bottom of the page—this can be done from the first tab screen. This will bring you to the Project Activities Screen

There are several activities' tabs on this page so you no longer have to go to the Activity Details screens for activity details. On the first screen under the Schedule tab, you will fill in the activity name (formerly description) and activity (formerly activity ID). To add a second activity, you need to check the box by the first activity and then click the add button to the left of the number of rows box and fill in the number of rows you want to add. The start and stop dates on this screen will default to the same ones as on your project screen and are informational only.

[New Window](#) | [Help](#) | [Customize](#)

Project Activities | Gantt Chart

Project: TRAINING Description: For training purposes Processing Status: Active

Number Rows: Expand: All Subtasks ▼

Project Activities Customize | Find | View All | First 1 of 1 Last

Schedule | More Dates | Details | User Fields

	WBS ID	*Activity Name	*Activity	*Start Date	*End Date	Percent Complete			
<input checked="" type="checkbox"/>	1	<input type="text" value="First"/>	ABC123	03/13/2008	06/30/2008	0.00			

[Save as Template](#)

[Return to General Information](#)

[Save](#) | [Return to Search](#) | [Notify](#) | [Refresh](#)

On the Details tab, you can choose an Activity type if you use those. Also, this is where you chose either an Active or Inactive Processing Status for each activity. Processing status is not effective dated for activities.

Project Activities Gantt Chart

Project: TRAINING Description: For training purposes Processing Status: Active

Number Rows: 1 Expand: All Subtasks

Project Activities Customize Find View

	WBS ID	*Activity Name	Activity Type	Cascade Owner	Activity Owner	Name	Activity Status	Processing Status
<input checked="" type="checkbox"/>	1	First	NEW1	<input type="checkbox"/>			...	Active

Save as Template

[Return to General Information](#)

Save Return to Search Notify Refresh

If you choose Save as Template on the Activities Screen, you will see the same screen as if you chose this on the Projects Screen. The projects and all activities for the projects are saved in the template.

If you click on the Activities Definition button to the right of the percent complete box on the Activities Schedule tab, you will get the following screen, which is similar to the former Activities detail screen. There are more tabs on this screen, but most people are not using any of these other tabs now. You will also see this screen if you add activities to a project using the navigation Projects Costing>Activity Definitions>General Information.

General Information

Definition

Location

Attachments

Quality

User Fields

Rates

Project: TRAINING

Description: For training purposes

Activity: ABC123

*Description: First

Activity Type: NEW1

New Activity 2

Percent Complete: 0.00

System Source: PPC

Processing Status: Active

Activity Owner:

Activity Schedule

*Start Date: 03/13/2008

*End Date: 06/30/2008

Baseline Start Date:

Baseline Finish Date:

Early Start Date:

Early Finish Date:

Actual Start Date:

Actual Finish Date:

Late Start Date:

Late Finish Date:

Description

Find | View All

First

1 of 1

Last

Date/Time Stamp: 03/11/08 2:43:56PM

User ID: EHOLWEGNER@ND.GOV

Description:

Long Description:

Go To: [Activity Team](#) [Activity Status](#) [Project Transactions](#)

[Return to Project Activities](#)

Save

Return to Search

Refresh

Add

Update/Display

Include History

Correct History


You can create a new project by copying another project using the add a new value under Projects Costing>Projects Definition>General Information and selecting copy from project under the drop down box or you can use the Copy Project button on the first project screen for the project you want to copy.

Creating a new project from the General Information screen below:


The screenshot shows a web application interface titled "General Information". At the top, there are two tabs: "Find an Existing Value" and "Add a New Value", with the latter being the active tab. Below the tabs, there are three input fields: "Business Unit:" with the value "11000" and a magnifying glass icon; "Project:" with the value "EXAMPLECOPY"; and "Create:" with a dropdown menu showing "Project from Copy". Below these fields is a yellow "Add" button. At the bottom, there are two links: "Find an Existing Value" and "Add a New Value".

General Information

[Find an Existing Value](#) [Add a New Value](#)

Business Unit: 11000 

Project: EXAMPLECOPY

Create: Project from Copy 

[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)

The copy project screen didn't change. You select your copy options, the project you want to copy and the name of the new project. You can select all or some of the activities. Click on the copy button.

Copy Project

Project Business Unit: 11000 Description: Office of Management & Budget

Options

Copy Options: Copy Project & All Activities

*Project to Copy:

*Target Project:

*Copy Analysis Group:

☒ Reuse Activity ☐ Select All Activities ☐ Allow Transactions Copy

Activities				
Customize Find View All				
		First	1-2 of 2	Last
Activity	Description	Allow Copying	*Activity	
ABC123	First	<input checked="" type="checkbox"/>	ABC123	
DEF456	Second	<input type="checkbox"/>	DEF456	

Once you have created the new project, you will need to change the Project Status by clicking on the Project Status hyperlink. There is no project status until you select one. However the Processing Status is Active, so you need to select either approved or open for the project status. As before, if you want a different status, you will need to add them on the status page.

You need to change the Project Status when using the copy project feature and the Processing Status will be ACTIVE as it has been copied from the project copied. You will be able to use this new project with transactions even if you have not selected a Project Status. It is the Processing Status that allows the project to be used with transactions.

General Information		Project Costing Definition	Manager	Location	Phases	Approval	Justification	User Fields
Project:		2NDGLTEST		Add to My Projects				
*Description:	<input type="text" value="Testing"/>	<input type="checkbox"/> Program	Processing Status: Active					
*Integration:	<input type="text" value="11000"/>	OMB Integration		Project Status: Project Status				
Project Type:	<input type="text"/>							
Percent Complete:	<input type="text" value="0.00"/>	As Of:						
Project Health:	<input type="text"/>	As Of:						
Project Schedule								
*Start Date:	<input type="text" value="02/29/2008"/>	*End Date:	<input type="text" value="02/29/2008"/>	Additional Dates				
Description								
Find View All First 1 of 1 Last								
Date/Time Stamp:	04/11/08 1:57:46PM		User ID:	EHOLWEGNER@ND.GOV				
Description:	<input type="text"/>							

To create a new project using the copy button, find the project you want to copy and on the General Information tab, click the copy button.

Copy Project


Project Business Unit: 11000

Description: Office of Management & Budget

Project: EXAMPLECOPY

Description: For training purposes

Options

Copy Options: BOTH  Copy Project & All Activities


*Target Project: NEXT

*Copy Analysis Group:

☒ Reuse Activity ☒ Select All Activities ☐ Allow Transactions Copy

Copy

Activities

Customize | Find | View All | 

First 1 of 1 Last

Activity	Description	Allow Copying	*Activity
ABC123	First	<input checked="" type="checkbox"/>	ABC123

[Return to General Information](#)

The copy screen is the same as the screen that you get when creating a project from the Add a New Value tab create Project from Copy screen except you do not choose the project you want to copy, that comes up automatically with the Project you used in clicking the copy button. Again when you go to the new project created, you will need to select the Project Status.

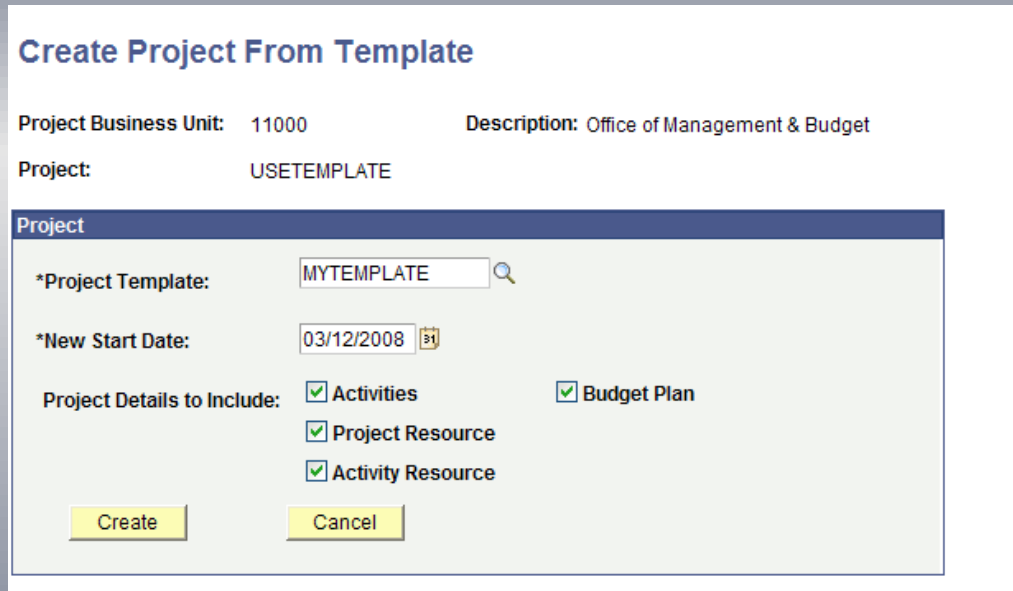
To create a Template to use for Projects: **Navigation> Project Costing >Project Definitions>General Information** and use the Add a New Value Tab. Give your Template a name and under the Create drop down box, select **“Project Template.”**

The screenshot shows a web application interface for creating a project template. At the top, there are tabs for 'General Information', 'Project Costing Definition', 'Manager', 'Location', 'Phases', 'Approval', 'Justification', and 'User Fields'. The 'General Information' tab is active. Below the tabs, the 'Project' field is set to 'MYTEMPLATE', and there is an 'Add to My Projects' button. The '*Description:' field contains 'Template to use'. The '*Integration:' field has '11000' and a search icon, with 'OMB Integration' displayed next to it. The 'Project Type:' field is empty with a search icon. To the right, the 'Processing Status:' is 'Template' with radio buttons for 'Public' and 'Private' (the latter is selected). The 'Project Status:' is 'Approved'. Below this is a 'Project Schedule' section with '*Start Date:' (03/11/2008) and '*End Date:' (03/11/2008). A 'Description' section shows a 'Date/Time Stamp' of 03/11/08 3:51:15PM and a 'User ID' of EHOLWEGNER@ND.GOV. At the bottom, there are links for 'Go To: My Projects', 'Project Valuation', 'Project Team', 'Project Activities', and a 'More' dropdown. Action buttons at the very bottom include 'Save', 'Refresh', 'Add', 'Update/Display', 'Include History', and 'Correct History'.

Templates have a Processing Status of Template and a Project Status of Approved. Neither can be changed as a template is not to be used with transactions. You will need to check whether or not the template is to be private or public. You add activities to a template using the Project Activities hyperlink. The status of the activities is also Template.

Creating a Project from a Template: Again use the Add a New Value Tab. Give your Project a name and under the Create drop down box, select “**Project from Template.**”

Select the template you want to use. You can change the Start Date here if you wish. Select the details to included. Note: There are no transactions for templates, so the Project resource and Activity resource details are not transactions. Then click the create button.



The screenshot shows a web-based form titled "Create Project From Template". At the top, it displays "Project Business Unit: 11000" and "Description: Office of Management & Budget". Below this, the "Project:" field is set to "USETEMPLATE". The main section of the form is titled "Project" and contains the following fields and options:

- *Project Template: A text input field containing "MYTEMPLATE" with a search icon to its right.
- *New Start Date: A date input field showing "03/12/2008" with a calendar icon to its right.
- Project Details to Include: A section with four checked checkboxes:
 - ☒ Activities
 - ☒ Project Resource
 - ☒ Activity Resource
 - ☒ Budget Plan

At the bottom of the form are two buttons: "Create" and "Cancel".

The new project created will have a Processing Status of Pending and the Project Status will need to be set up. You can choose from the various Project Status Options for this project as the Processing Status is Pending and not Active.

General Information	Project Costing Definition	Manager	Location	Phases	Approval	Justification	User Fields
Project: USETEMPLATE		Add to My Projects					
*Description: Template to use		<input type="checkbox"/> Program		Processing Status: Pending			
*Integration: 11000		OMB Integration		Project Status: Project Status			
Project Type:							
Percent Complete: 0.00		As Of:					
Project Health:		As Of:					
Project Schedule							
*Start Date: 03/12/2008		*End Date: 03/12/2008		Additional Dates			
Description							
Find View All First 1 of 1 Last							
Date/Time Stamp: 03/11/08 3:55:25PM		User ID: EHOLWEGNER@ND.GOV					
Description:							
Long Description:							
Save as Template Import from Template Copy Project							

If you created a project from a template, you will also have a button called Import from Template. This button is available only before you change the Project Status and save the project. You can use this button to import more activities from another template or from the same template if you didn't check the activities box when you created the project. Once you click the import button, it will override any identical information in your project, such as duplicate activities.

Import from Template

Project Business Unit:	11000	Description:	Office of Management & Budget
Project:	2NDTEMPUSE	Description:	Template to use

***Project Template Name**

*Project Template:

Project Details to include:
 ☐ Project Level
 ☒ Activities
 ☒ Project Resource
 ☒ Activity Resource

Import
 Cancel

Project Resources are now Transactions. To view transactions on-line, the navigation is **Project Costing>Transaction Definitions>Transaction List**. The Screen to view the transactions didn't change.

[New Window](#) | [Help](#)

Transaction List

Project: TRAINING Description: For training purposes
Activity: ABC123 Description: First [Transaction Adjustment](#) [Add Transactions](#)

Analysis Group:


From Date: Through Date:

Date Type: Max Rows:

Project Transactions								Customize Find View All		First		1 of 1		Last
*Analysis Type	Source Type	Category	Subcategory	Quantity	Unit of Measure	Source Amount	Source Currency							
							USD							

[Return to Project Costing](#)

Resource Types are now Source Types. Navigation to set up source types is **Set Up Financials/Supply Chain>Product Related>Project Costing>Transaction Options>Source Types**




Source Types


Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value


Add a New Value


SetID:

= 

11000 

Source Type:


begins with 

NEW5 

☐ Include History ☐ Correct History

Search

Clear

[Basic Search](#)  [Save Search Criteria](#)


[Find an Existing Value](#) | [Add a New Value](#)


Resource Categories and Resource Subcategories are now just Categories and Subcategories. The Navigation to add or view these for your Business unit is the same as for Source Type above, except the last selection is Categories or Subcategories.

Categories


Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

SetID: 

Category: 

☐ Include History ☐ Correct History


[Search](#) [Clear](#) [Basic Search](#)  [Save Search Criteria](#)


[Find an Existing Value](#) | [Add a New Value](#)

Subcategories


Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

SetID: 

Subcategory: 

☐ Include History ☐ Correct History

[Search](#) [Clear](#) [Basic Search](#)  [Save Search Criteria](#)




General Ledger and Accounts Payable distribution lines now have all the blanks for project information in place of having to click on the Projects hyperlink.












New look for General Ledger distribution lines:

[illegible]

New look for Accounts Payable distribution lines:

☐ Use One Asset ID Calculate

[Customize](#) | [Find](#) | View All |  First  1 of 1  Last

Assets	Account	Oper Unit	Fund	Dept	Class	PC Bus Unit	Project	Activity	Source Type	Category	Subcategory
	<input type="text"/> 	<input type="text"/> 	<input type="text"/> 	<input type="text"/> 	<input type="text"/> 	<input type="text"/> 	<input type="text"/> 	<input type="text"/> 	<input type="text"/> 	<input type="text"/> 	<input type="text"/> 